

INSTRUCTIONS — TRUST INFORMATION FORM

GENERAL: This form provides the Clerk of Court with the information necessary to qualify trustees. This sheet contains special instructions to help you fill out this form. If you have any questions, you should telephone the Clerk. If you are unable to complete this form, the Clerk will help you. You should telephone the Clerk's office for an appointment before you go to the courthouse. Please complete as much of this form as possible before you see the Clerk.

Line 1. If this is a trust created by a will, state the decedent's full name, followed by the word "Deceased." If this is an *inter vivos* trust created by a person who was living at that time, state that person's full name, followed by the word "Settlor." If this is a trust created or augmented by court order (or authorized by court order to be created or augmented by an individual or organization) as a part of the settlement of a legal action, put the word "Court" on this line.

Line 7. This can be the same as the person making the request.

Lines 11-14. These lines are used to identify co-trustees, if there is more than one.

Line 15. Because of the difficulty in determining exact values at the time of qualification, the Clerk will accept a reasonable estimate of the fair market value of the trust's personal property. If you do not know the actual value of the trust's real property, you may use its assessed value for local real estate tax purposes.

Lines 18-20. These questions must be answered by the person(s) who wishes to be qualified as guardian by the Clerk. A "yes" answer to any of these questions does not automatically disqualify a person from serving. Each case must be decided by the court based on its specific facts.

TRUST INFORMATION FORM

Court File No.

COMMONWEALTH OF VIRGINIA

(For appointment/qualification of a trustee including court-ordered trusts and structured settlements.)

Circuit Court of

1. Name of Estate or Settlor
2. Is this a trust created by a will? ☐ yes ☐ no. If yes, will is recorded in Book Page
or Clerk's Instrument No. Date of Instrument
3. If court-ordered trust, date of order and case number
4. Name of person making request
5. Mailing address
6. Basis for request: ☐ trustee named in will ☐ other (specify)
7. Name of person seeking appointment
8. Day telephone Night telephone
9. Residence address
10. Mailing address, if different
11. Name of additional person seeking appointment
12. Day telephone Night telephone
13. Residence address
14. Mailing address, if different
15. The maximum value of assets to be held in the trust is estimated as follows:
(a) Personal Property \$
(b) Real Property \$
TOTAL VALUE OF TRUST \$
16. Name of assisting attorney, if any Telephone
17. Attorney's mailing address

I hereby certify that to the best of my knowledge and belief this is an accurate statement of facts, and I acknowledge a continuing legal duty to report any later discovered errors or inconsistencies to the Clerk of Court.

..... DATE PRINTED NAME OF REQUESTING PERSON SIGNATURE OF REQUESTING PERSON
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INFORMATION TO BE FURNISHED BY EACH PERSON SEEKING APPOINTMENT

18. Have you ever been convicted of a felony? ☐ yes ☐ no. (If yes, explain the details on a separate sheet of paper.)
19. Have you ever filed for bankruptcy? ☐ yes ☐ no. (If yes, explain the details on a separate sheet of paper.)
20. Are you now, or have you ever been, an attorney at law in Virginia or elsewhere? ☐ yes ☐ no. (If yes, and you do not now possess an active license from the Virginia State Bar, explain the details on a separate sheet of paper.)

I (we) hereby certify that to the best of my (our) knowledge and belief this is an accurate statement of facts, and I (we) acknowledge a continuing duty to report any later discovered errors or inconsistencies to the Clerk of Court.

..... DATE PRINTED NAME OF PERSON SEEKING APPOINTMENT SIGNATURE OF PERSON SEEKING APPOINTMENT
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..... DATE PRINTED NAME OF PERSON SEEKING APPOINTMENT SIGNATURE OF PERSON SEEKING APPOINTMENT
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